COMMONWEALTH
of
VIRGINIA

Department of Mental Health,
Mental Retardation and
Substance Abuse Services

Community Support Services
Office of Mental Health

PACT
Data Entry and
Reporting System

INSTRUCTION MANUAL

Installation Notes

The PACT Data Entry and Reporting System is written in Microsoft® Access97®. You must have Access97 or a later version of Access installed on your system to use this software. If a newer version of Access is used, you must decide whether you would like to convert to the newer version. If you have not yet converted all PCs in your organization to Access2000, you may want to consider maintaining your database in Access97. Once converted to Access2000, that particular copy of the database will no longer work in Access97. However, you would still be able to run the Access97 version of the database using Access2000.

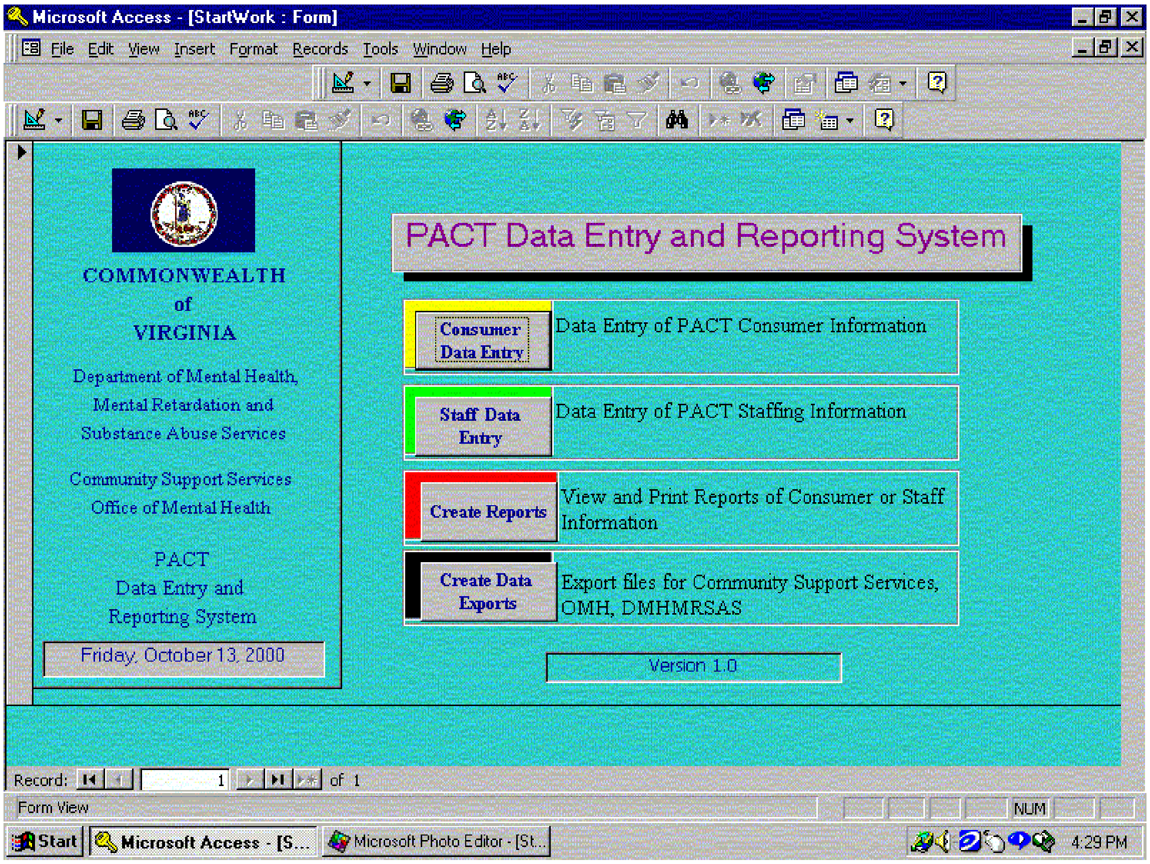
The database has been provided to you in split format to allow you to run it on a network.

1) Install the back-end of the database on a network drive.
2) Install the front-end of the database on each user's PC.
3) Open the front-end database; go to Add-Ins on the Tools menu and select Linked Table Manager.
4) A list of Tables will appear. Click "Select All" and then "OK".
5) Designate the new location of the back-end of the database.

Note: The PACT Data Entry and Reporting System was designed using a screen resolution of 800 x 600. Running the program at higher screen resolutions may result in a loss of screen images.

PACT Data Entry and Reporting System

Instruction Manual



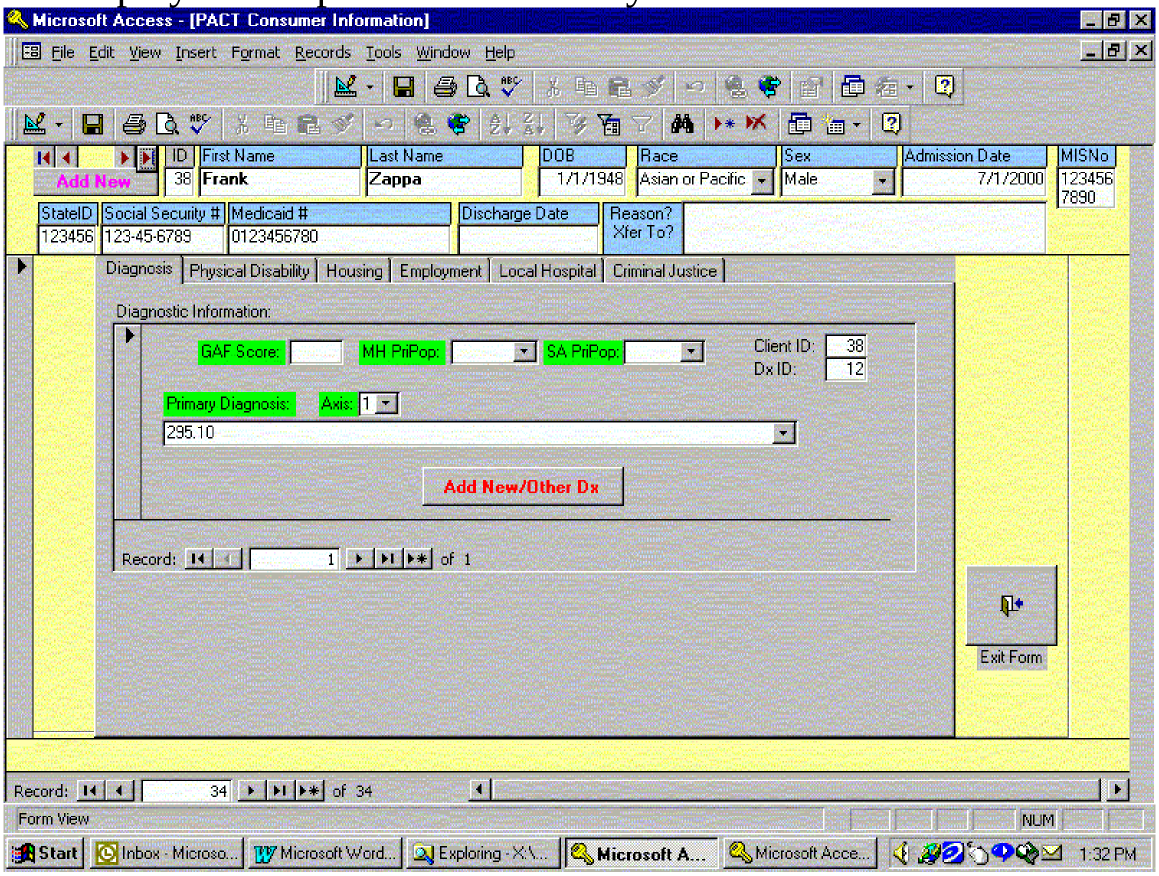
This is the main data entry screen that is displayed at startup.

Select one of the command buttons –

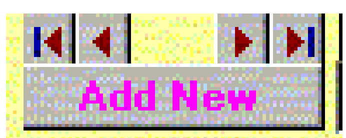
- **Consumer Data Entry** (to add new consumers and related information);
- **Staff Data Entry** (to add new staff members, staffing positions, etc.);
- **Create Reports** (to view and print reports);
- **Create Data Exports** (to export Consumer and Staff data).

Consumer Data Entry

This is the PACT Consumer Information screen. Consumer records are displayed in alphabetical order by last name.



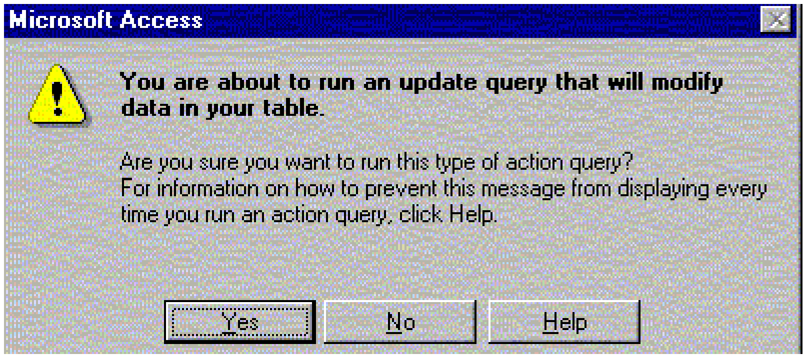
To navigate through the records, use the [Page Down] and [Page Up] keys or the command buttons in the upper left corner:



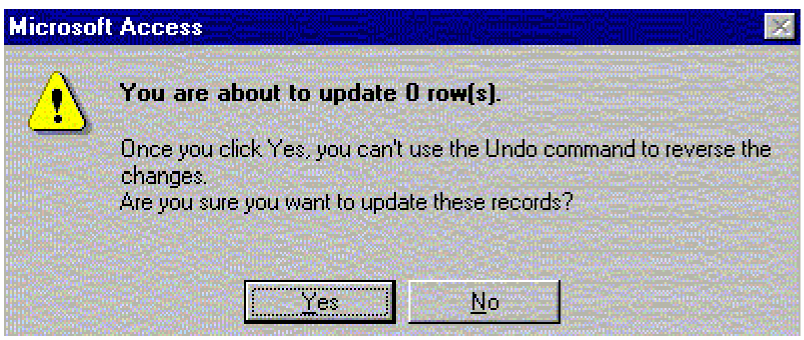
To move from one field to the next within the consumer's record, use the [Tab] key or point and click with your mouse. If you do not yet have the information required to complete a data field, simply tab over it. Data can be added or corrected at any time.

- How Records Are Updated -

Note: If records are changed (or empty data fields are filled after the first time the record is created), Access will prompt you with the following message box:



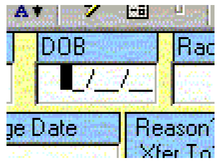
Hit "Yes"*, (unless of course, you made a mistake and did not mean to enter new or changed data). Access will then prompt you a second time:*



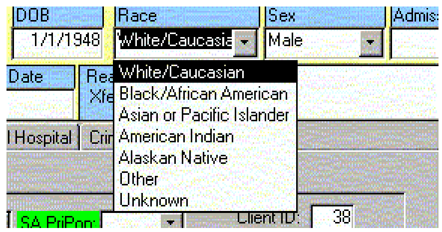
Hit "Yes"*. The number of rows you are* "about to update" *depends upon whether or not the record has already been exported. If not, it will equal* "0 row(s)"*. If it has already been exported, it will equal* "1 row(s)"*.*

This applies to all records – revised consumer information, changed or updated diagnoses, housing or employment events, and so forth.

After entering the consumer’s first and last name, enter the date of birth in the “DOB” field in the format – mmddyy. *(For example, Frank’s birthday is entered “010148” without the “/” key.)*



Note that “Race” and “Sex” have drop-down boxes. Simply click on the correct choice:



Enter the date the consumer was enrolled on the PACT Team in “Admission Date”, using the same format as shown above. *(All date fields in the software use this same format.)*

Enter the consumer’s “MISNo” *(the agency’s Client ID #).*

Enter the consumer’s six-digit “State ID” *(also sometimes called the “regno”).*

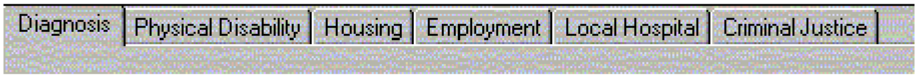
Enter the consumer’s nine-digit “Social Security Number”.

Enter the consumer’s “Medicaid #”.

If the consumer is discharged from the PACT Team, enter the “Discharge Date”. In the “Reason? Xfer To?” field, enter a brief note detailing the reason for the discharge and the service to which the consumer was transferred. *(Lengthy notes can be entered here but will not be fully visible without scrolling down.)*

Other Consumer Related Data

Click on any of the following tabs to enter and view other information about the consumer:

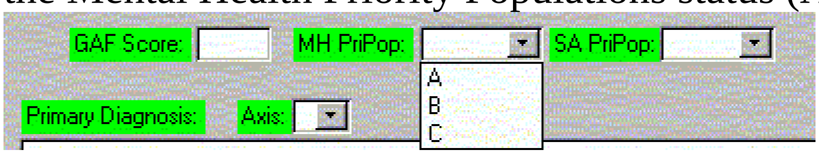


(Information can be entered as it is gathered over time, as long as a few simple rules are followed. These are explained in the following sections.)

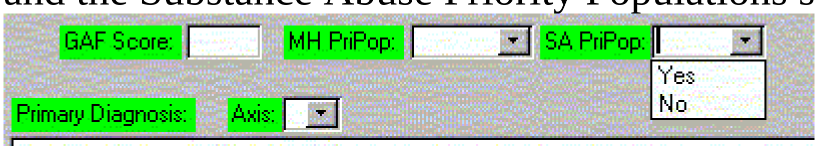
Diagnosis

Enter the consumer's current diagnostic information, including the two-digit GAF score,

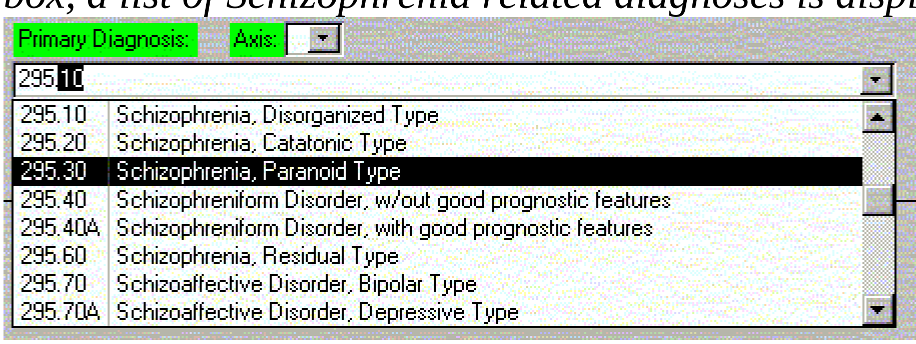
the Mental Health Priority Populations status (A, B, or C)



and the Substance Abuse Priority Populations status (Yes or No).



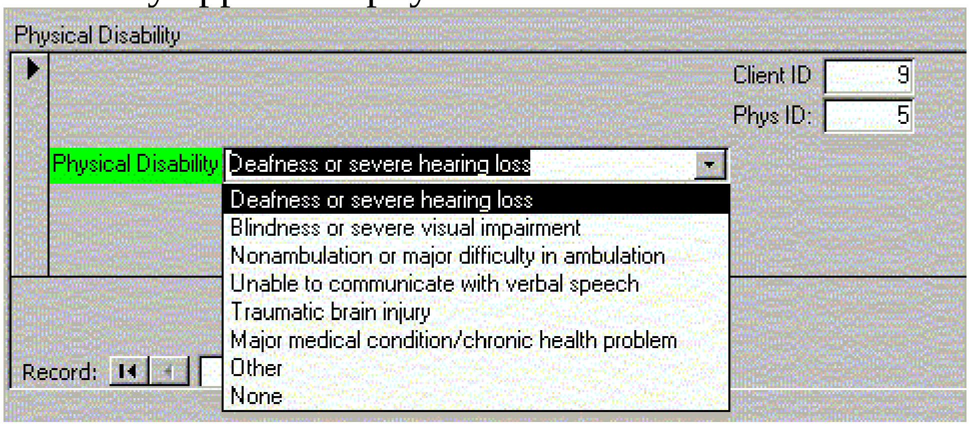
The DSM diagnosis may either be entered manually, chosen from the drop-down box, or a combination of both. *(For example, by entering the number "295" and then clicking on the drop-down box, a list of Schizophrenia related diagnoses is displayed.)*



A consumer may have more than one primary diagnosis. (*When entering a second primary diagnosis, leave all other fields except the "Axis" field blank. However, if you are recording a change in the consumer's primary diagnosis, please re-enter all of the data fields.)*

Physical Disability

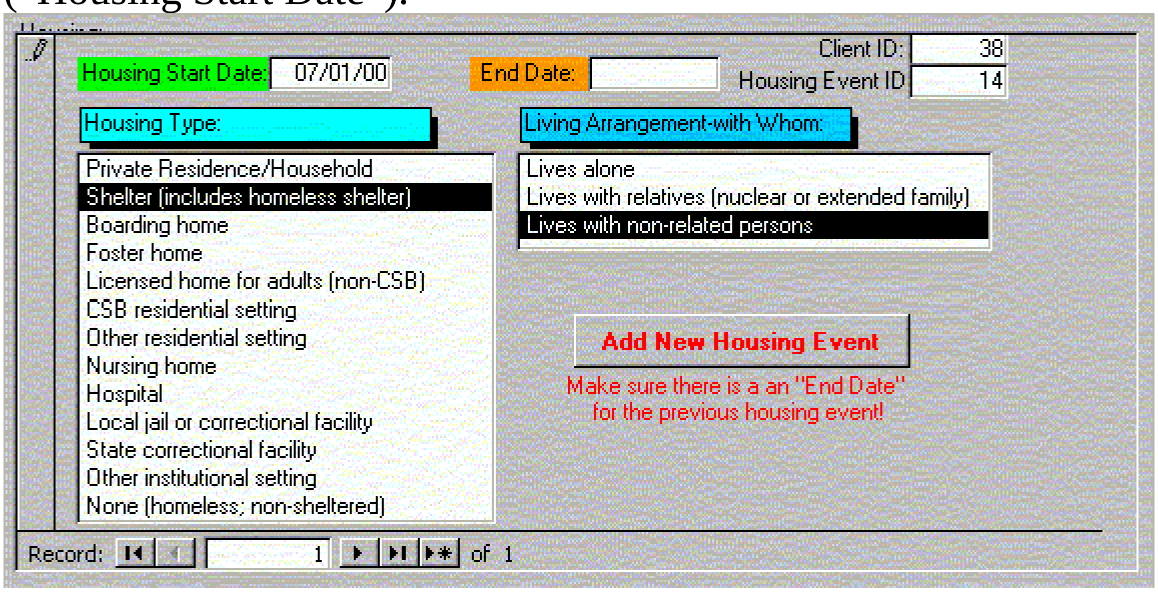
Click any applicable physical disabilities:



Note: "Major medical condition/chronic health problem" is one that requires ongoing treatment.

Housing

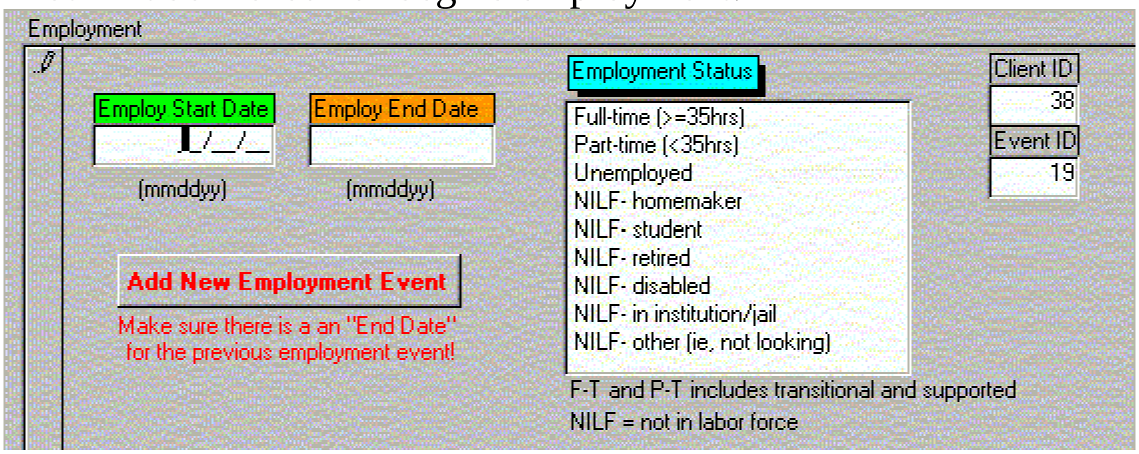
First, enter the date the consumer moved into the housing type ("Housing Start Date").



Then choose the correct “Housing Type” and “Living Arrangement – With Whom”.

Note: If the consumer moves, first enter an “End Date”, *then click* “Add New Housing Event”.

Employment
First, enter the date the consumer is categorized as unemployed or “not in labor force” or begins employment.



Then choose the correct “Employment Status”.

Note:
“Full-time (>=35hrs)” *means the consumer is employed 35 hours or more per week, including transitional and supported employment.*

“Part-time (<35hrs)” *means the consumer is employed less than 35 hours per week, including transitional and supported employment.*

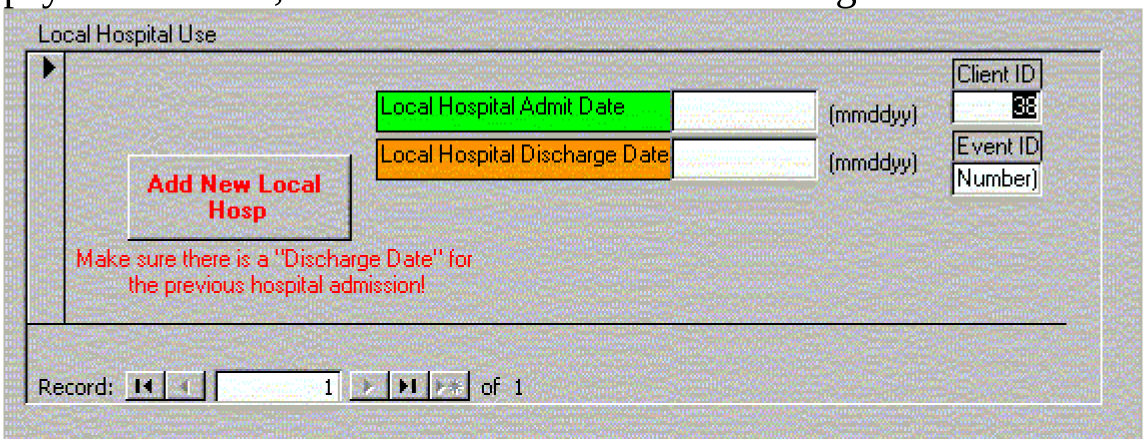
“Unemployed” *means the consumer was previously employed and is (or likely will) actively seeking employment.*

“NILF” *means the consumer is not seeking employment because of one of the stated reasons.* “NILF – other” *means the consumer is unemployed and has stopped actively seeking employment.*

Note: If the consumer's employment status changes, first enter an "Employ End Date", *then click* "Add New Employment Event".

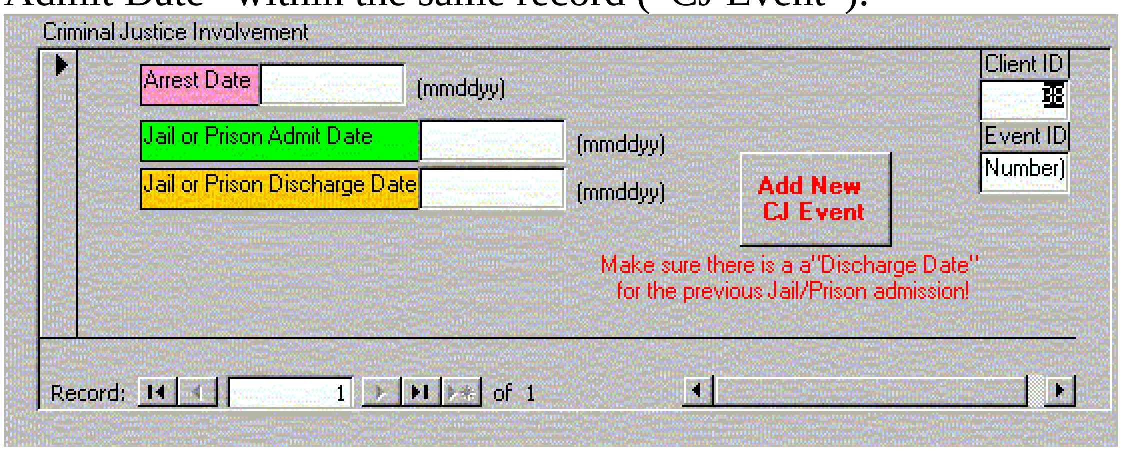
Local Hospital

If the consumer is hospitalized (other than a state facility) for psychiatric care, enter the admission and discharge dates.

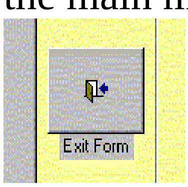


Criminal Justice

If the consumer is arrested, enter the "Arrest Date". If the arrest results in admission to jail or prison, enter the "Jail or Prison Admit Date" within the same record ("CJ Event").

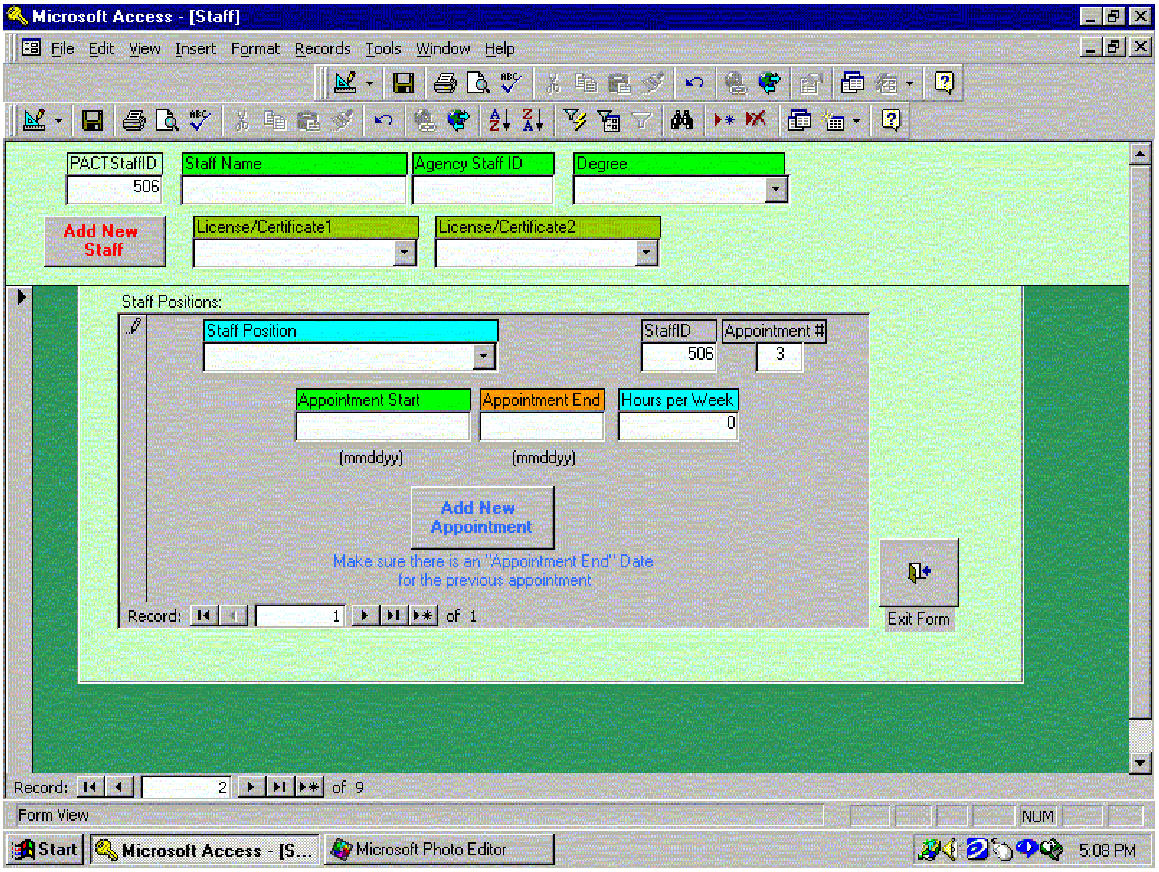


This concludes the chapter on consumer data entry. To return to the main menu, click "Exit Form".

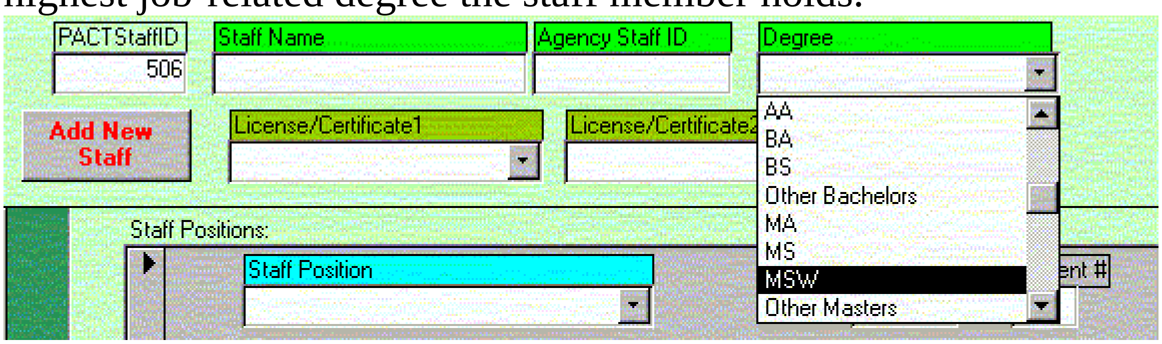


Staff Data Entry

This is the PACT Staff Information Screen.

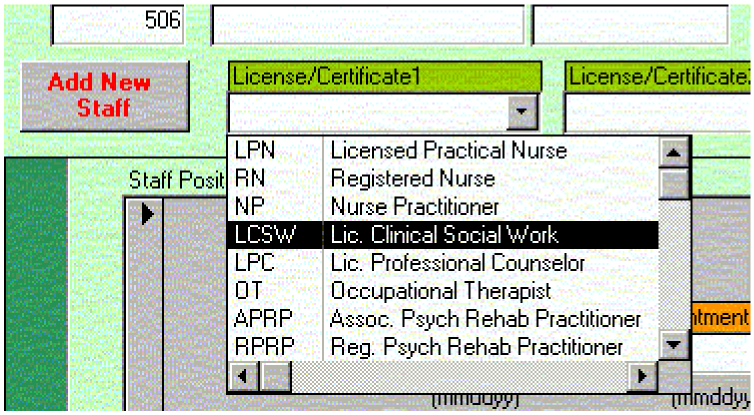


Enter the staff member's name and agency ID. Then select the highest job-related degree the staff member holds.



Note: If the staff member's degree is not listed, choose the most closely related one but do not exceed the correct level of education (e.g., for all Associates Degrees, select "AA")

Select up to two job-related licenses or certificates the staff member holds.



Staff Position

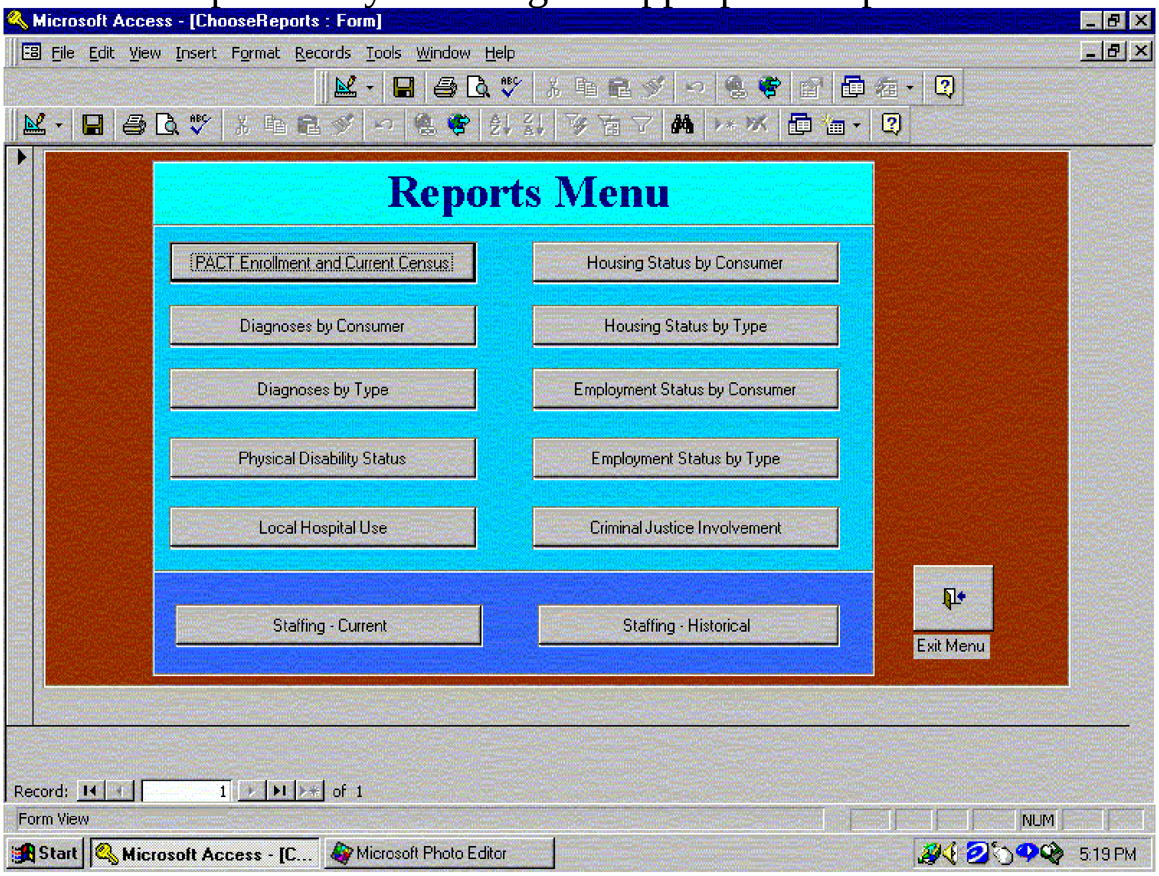
Select the position the staff member serves on the PACT Team.

Position Appointment

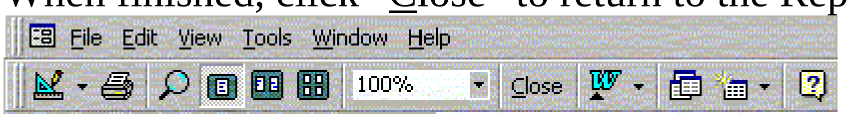
Enter the date the staff member is appointed to the position and the hours per week the staff member works in this position. *(If the agency's work week is less than 40, round full-time positions up to 40 hours per week.)*

Create Reports

This is the Reports Menu. Consumer and Staff related data may be viewed and printed by selecting the appropriate report.



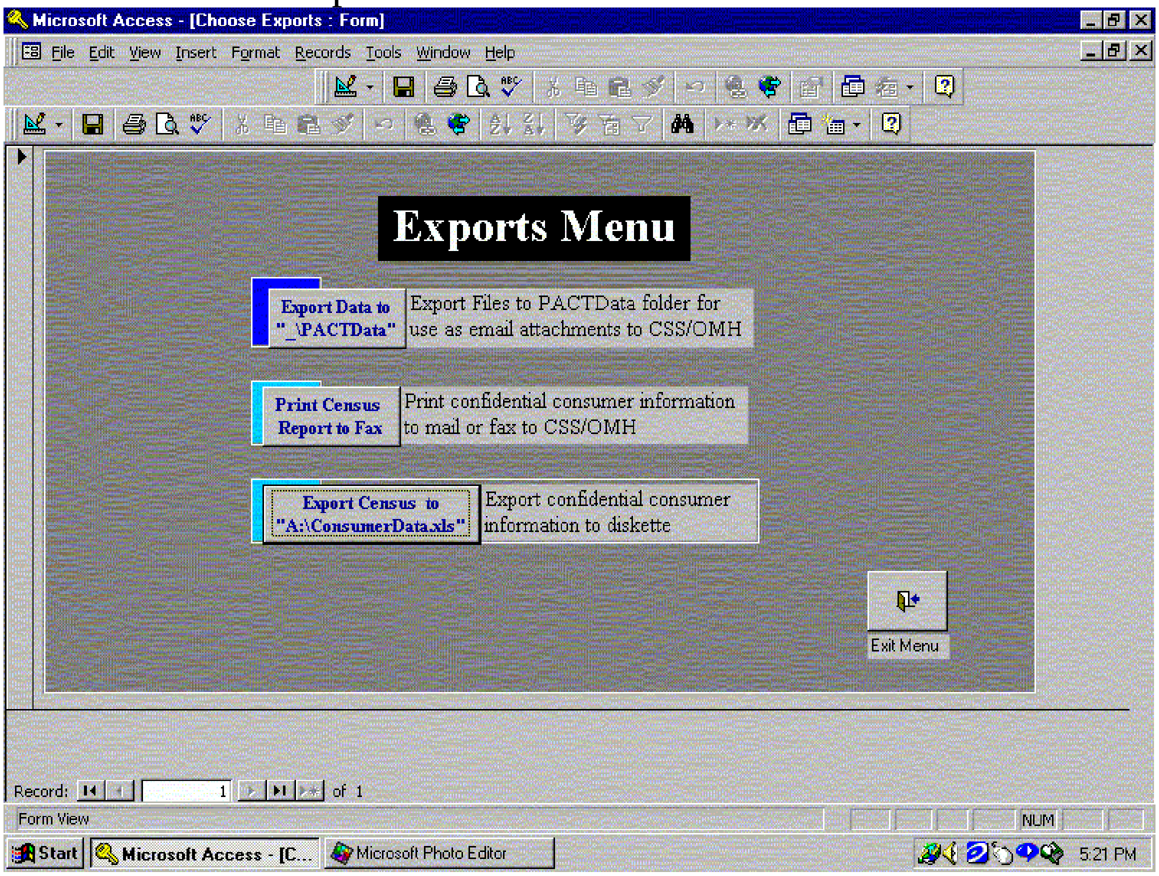
Use the Window's Toolbar when viewing and printing the report. When finished, click "Close" to return to the Reports Menu.



Note: If you select the "PACT Enrollment and Current Census" *report, you will be prompted to enter a report date (mmddyy).*

Create Data Exports

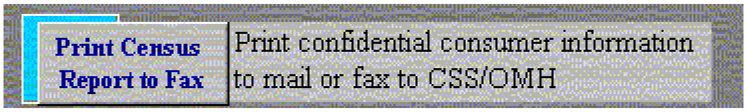
This is the Data Exports menu.



At the end of each month, select "Export Data to '_\PACTData'" to create files to be sent to the Community Support Services section of the Office of Mental Health at the DMHMRSAS Central Office.

Note: When the software is first installed, a folder is set up to hold these data files. You are required to attach these files to an email each month and send them to CSS/OMH.

Select “Print Census Report to Fax” to print out confidential consumer information that should be faxed and not be sent by email to CSS/OMH.



Note – this is the same as selecting the “PACT Enrollment and Current Census” report; you will be prompted to enter a report date (mmddyy).

Select “Export Census to ‘A:\ConsumerData.xls’” to create an Excell spreadsheet on diskette of confidential consumer information as an alternative to printing and faxing.